TRACS User Management Guide

This guide is for User Administrators Only. Each state and WSFR region has an assigned User Administrator that has been appointed by their agency/division head or director. For more information on the appointment process or if you have questions about the status of your registration request, please contact your User Administrator or the TRACS Help Desk.

For more information on User Management, visit:
https://tracs.fws.gov/learning/mod/book/view.php?id=21&chapterid=95

When a user completes the registration process for the TRACS production (live) site or TRACS training site, a system generated email is sent to the user notifying them that their registration has been received and they will be notified once it is approved.

The User Administrator for each agency/division is responsible for approving user requests for the live environment. Note: The TRACS help desk is responsible for approving user requests for the training environment only.

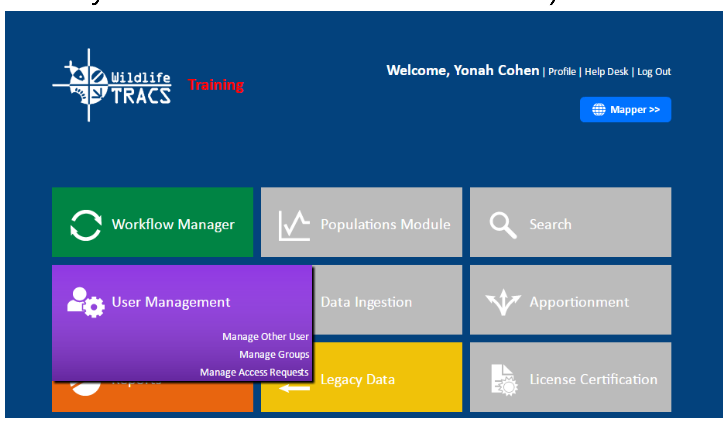
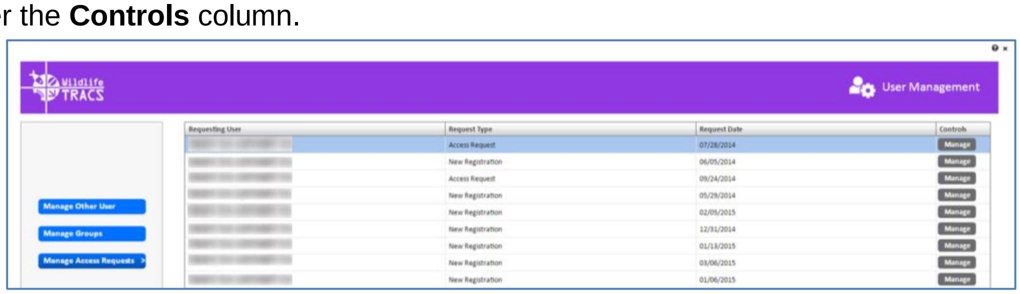
Each user is assigned to a **user group** (agency/division/region) and **user role** (permissions within their assigned groups to edit, review and/or approve projects and reports).

User Role (Permissions):

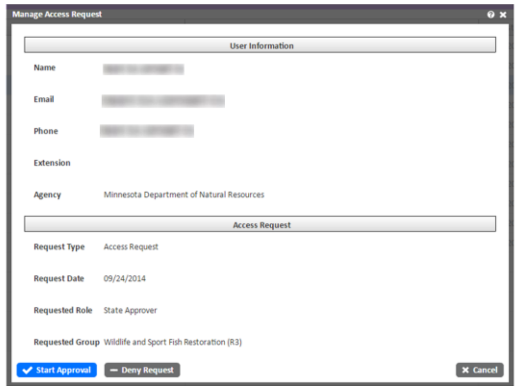
Project proposals and performance reports go through an approval workflow in TRACS (separate from the grant approval process). The approval workflow sends the project through **state peer review**, **state approval**, **WSFR review** and **WSFR approval**. The user administrator is responsible for assigning users to the correct permission level to complete their assigned tasks. Contact your supervisor or WSFR federal aid coordinator for more information.

TRACS permissions are hierarchical with each level above having the same access as the role below. The **User Administrator** role can be separate or added to any of the existing roles. The **View Only** role allows fiscal users to access reports and view project data without the ability to make changes or execute workflows.

Manage Access Requests

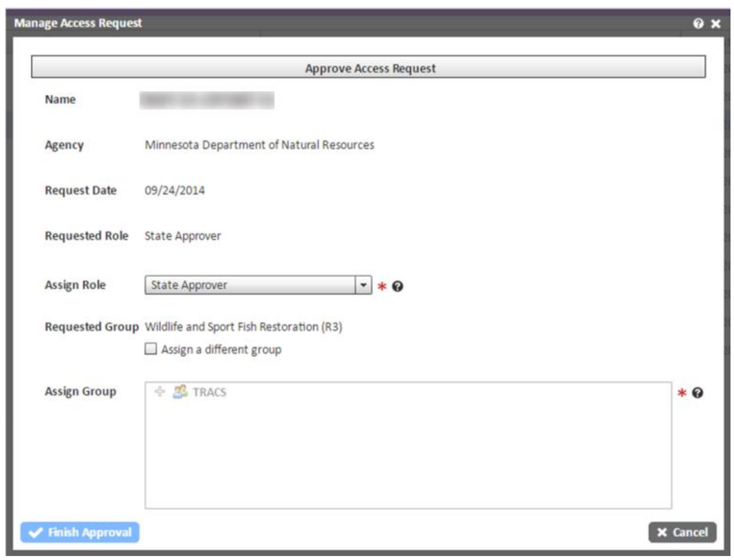
Step	Action
	When a new user in your division/agency/region registers for access to the live TRACS environment, you will receive an automated email from TRACS with the subject **“New TRACS Registration Request Waiting for Your Approval”**. All users with access to TRACS can edit their own profiles and submit requests for additional access. These requests are sent to the User Administrator via an automated email from TRACS with the subject “**New TRACS Access Request Waiting for Your Approval”**. As the user administrator, you will need to log in to TRACS to review and approve access requests within your assigned agency/division/region.
1	Log into the **TRACS** live site: https://tracs.fws.gov/data_tracs/dt/dashboard Enter your username and password and click the **Agree and Login** button.
2	From the Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators).  The User Management Module contains three links: • **Manage Other Users:** edit other users profiles and permissions • **Manage Groups:** create, edit or delete groups and sub-groups • **Manage Access Requests:** displays a list of users who need to have their access requests approved
3	Select **Manage Access Requests** to open the User Management window. A list of requesting users displays for the administrators identified for their division/agency/region. The request type will display as either **New Registration** or **Access Request.** For each one, click on the **Manage** button located on the right side under the **Controls** column. 

<table>
<tr><td>4</td><td>The Manage Access Request form opens and contains the user profile information and access level requested by the user. Click the Start Approval button on the bottom left of the form.

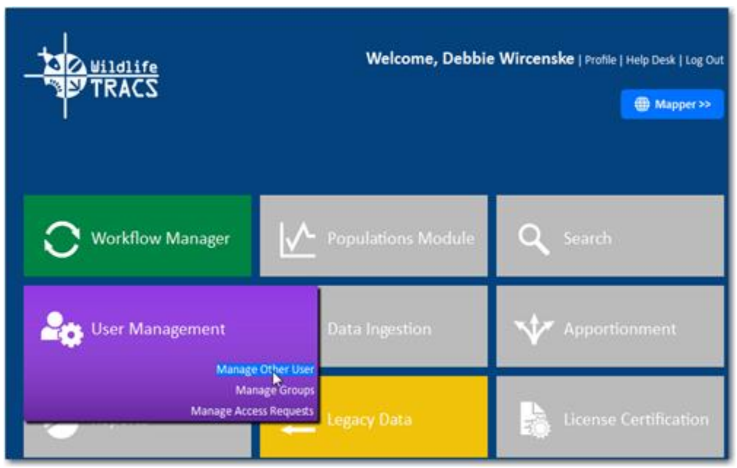
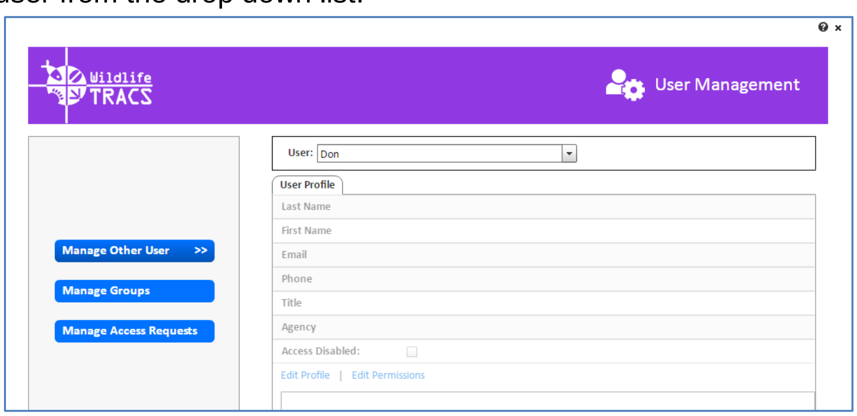


</td></tr>
<tr><td>5</td><td>On the Approve Access Request form, verify that the user's Requested Role and Requested Group are correct. Typically the agency listed for the user should match the requested group.

If the Requested Role is incorrect: select the correct role from the Assign Role drop down menu.
If the Requested Group is incorrect: check the box to Assign a different group. Then select the correct group from the Assign Group box by clicking on the plus sign (+) to expand the agency lists below TRACS.



Note: The Requested Role is the default role assigned to user request. The default role is identified from the Agency Type selected by the user when registering for access to TRACS. The default role for users associated with a federal agency is Federal Reviewer. The default role for users associated with a state or tribal agency is State Editor.</td></tr>
<tr><td>6</td><td>Once the request has been reviewed (and corrected), click the Finish Approval button and click Ok. The requesting user will receive a system notification email with the subject TRACS Registration Request Approved.</td></tr>
</table>

Manage Other Users (Edit User Profile, Permissions and Disable Access)	
Step	**Action**
	The user administrator has access to edit user profiles and permission levels. (Note: users can edit their own profile information and request additional access from the **Profile** tool). User Administrators are also responsible for deactivating end-user accounts when access is no longer needed. A user account that has been disabled can be **reactivated** by the **User Administrator** using the **Manager Other User** tool. The deactivated user does not need to submit a new access request.
1	From the Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators). Select **Manage Other User**. 
2	In the User Search box, type in the first three letters of first or last name. Select the user from the drop down list. 

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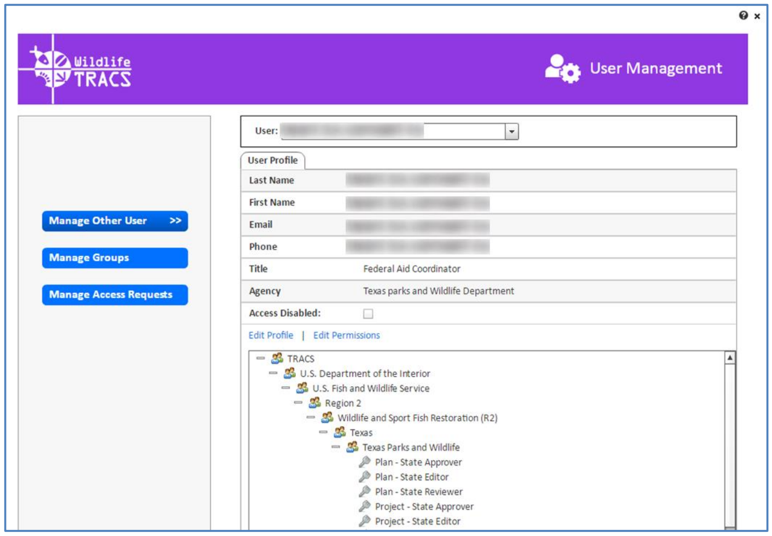
<td>The user’s profile will display. To view their permissions, click on the plus sign (+) next to TRACS and next to each sub-menu (agencies are nested in TRACS to show the hierarchy). Agencies display with the people icon and permissions display with the key icon .

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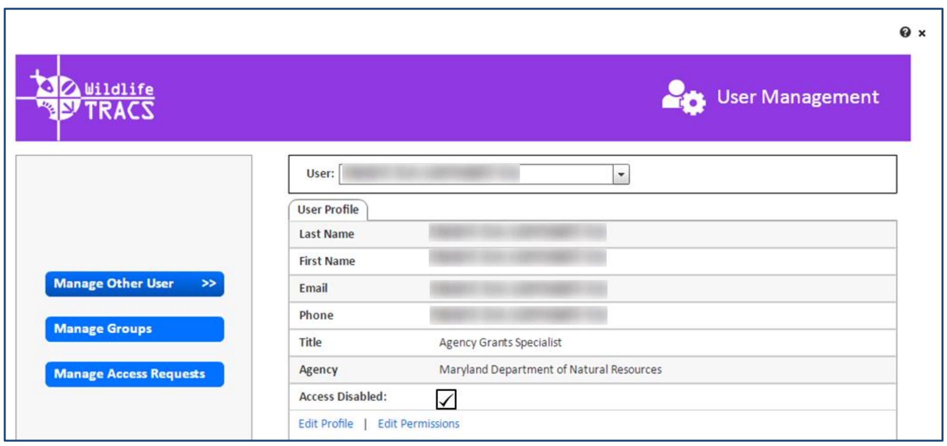
<td>4</td>
<td>When a user no longer needs access to TRACS, the user administrator should deactivate their account by checking the Access Disabled box. If the user has been deactivated and needs to be reactivated, uncheck the box.

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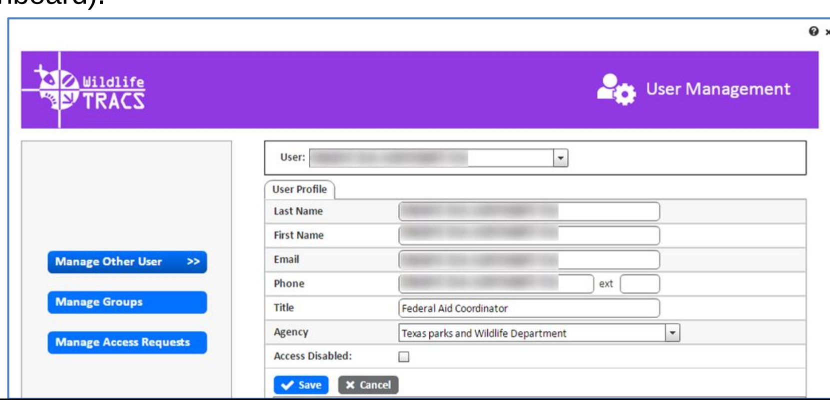
<td>5</td>
<td>To edit the user’s profile information, click Edit Profile, make any necessary changes and click Save. (Note: Users can manage their own profiles through the Profile button on the Dashboard).

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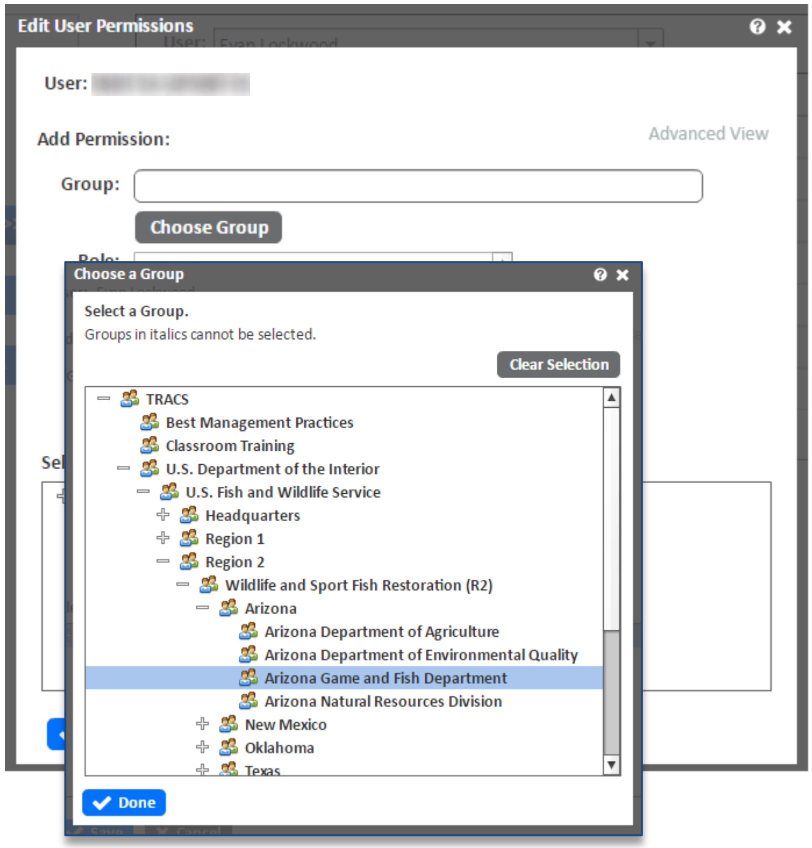
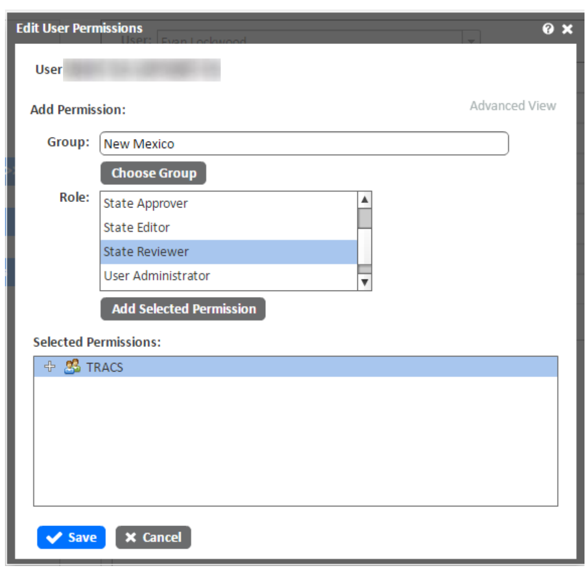
To edit their permissions, click Edit Permissions.

- On the Edit User Permissions window, click **Choose Group.** The Choose Group window will open. Select the plus sign (+) next to TRACS and each submenu to find and select the correct group. Then click **Done**.



- Then select the role to assign to the user for that group and click **Add Selected Permission.** Add any other permissions needed, then click Save.



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<table>
<tr><th colspan="2">Manage Groups and Subgroups</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

User Administrator is the only role in TRACS with permission to manage groups and subgroups.

Groups refer to an agency, division or regional office that has specific permissions with TRACS (e.g. Region 1). **Sub groups** are nested below another group in a parent-child relationship (e.g. Division of Aquatic Education, Department of Wildlife etc.).

Groups are hierarchical with a parent-child relationship and are displayed in a tree structure within each parent group. Group permissions allow users to enter or edit projects within their group (and sub-groups below them in the hierarchy).

This is important because users assigned to a parent group will have “inherited permissions” to enter or edit projects for all child subgroups below the parent group. Whereas users assigned to a child group will only have permissions to enter or edit projects for that group.

Troubleshooting Tips for User Administrators:

- Assign users to the appropriate group, keeping in mind that they will have access to enter or modify projects for that group and any subgroups below it.
- If a user is not able to access a project, it could one of two issues:
    1. The <u>user is not assigned to the correct group</u> so you may need to check their permissions.
    2. The <u>project is not assigned to the correct group</u>, in which case the user who created the project (or a user in the parent group) needs to change the group associated with the project to the correct group. See chapter 3. Defining your Project Properties (section on the Groups Tab at the bottom of the page) for more information.

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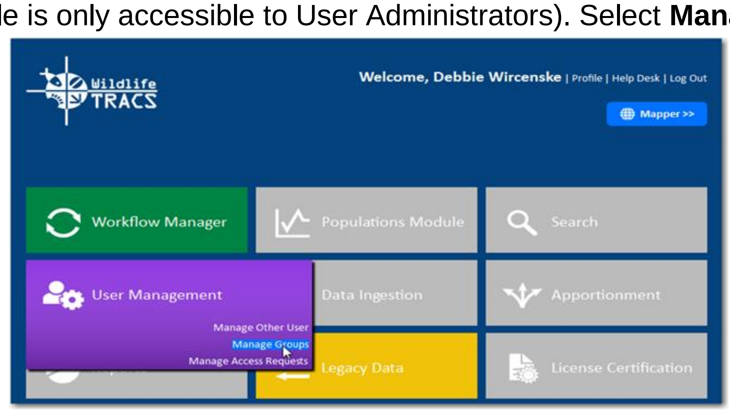
From the Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators). Select **Manage Groups.**



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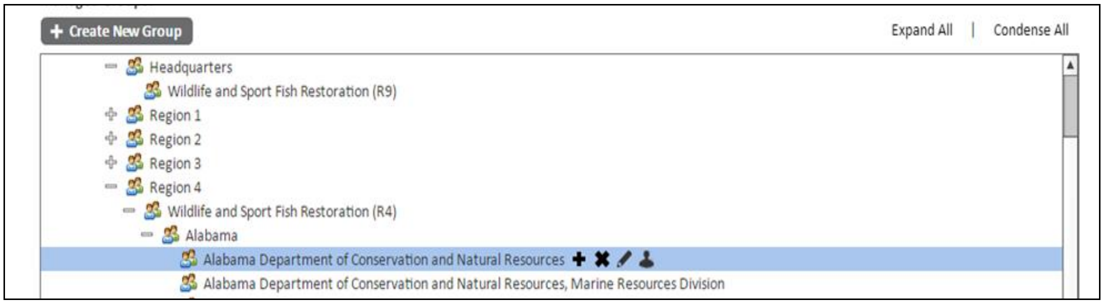
<tr><td>2</td><td>The Manage Groups window opens. To view information about existing groups, click on the plus sign (+) next to TRACS and each sub-menu below it. (<u>Tip</u>: Use the buttons on the top right to Expand All or Condense All.)


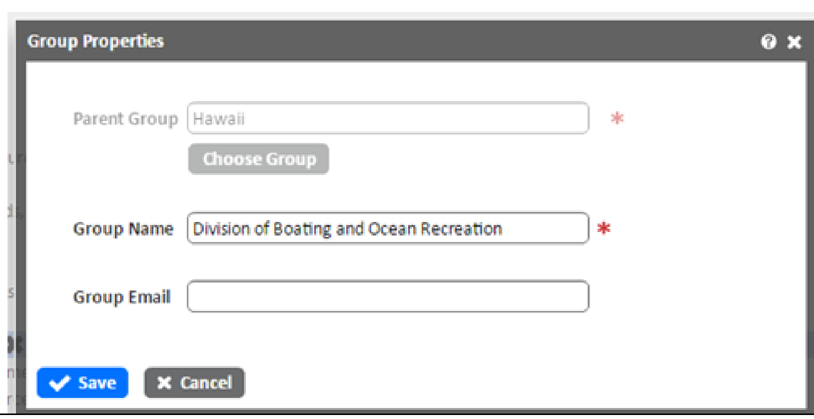
</td></tr>
<tr><td>3</td><td>When a group is selected, buttons will appear to the right.

Click the plus sign to create a new child group.
Click the X icon to delete a group (note: you will not be able to delete a group that has projects or users associated with it.)
Click the pencil icon to edit the group information.
Click on the person icon to view a list of users belonging to that group.

When the list of users opens, the pencil icon on the right will open the user's profile where you can view their assigned roles and edit their permissions.
The box in the upper right can be checked to "include users with inherited permissions" (users at a higher level will have permissions to all groups nested below them).

</td></tr>
<tr><td>4</td><td>Select Create New Group at the top of the window or click on the plus sign next to a group in the table (see figure 2).The Create A New Group window will open.

Select Choose Group and click the + sign to expand sub-menus to select the Parent Groups (e.g. Hawaii)
Type in the full group name and do not abbreviate (e.g. Hawaii Division of Boating and Ocean Recreation)
Group email should be left blank (may be used for automated notifications in the future)
Click the Save button



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